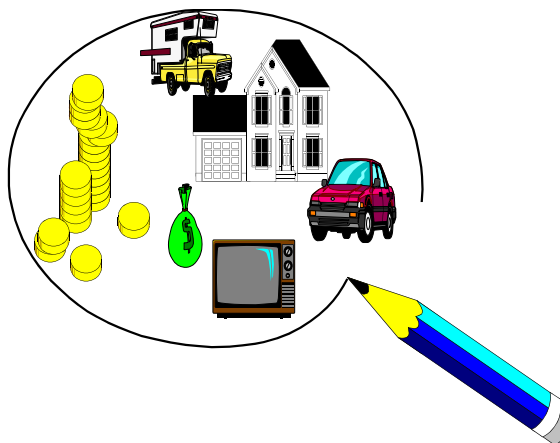


ASSESSMENT OF ASSETS

Asset information for a married person entering a:

*Long Term Care Facility or a

*Home and Community Based Waiver.



We do not discriminate because of race, color, handicap, national origin, age, sex, political beliefs, or religion.

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What is an Assessment?

An assessment is an evaluation of all assets of a married couple. Some assets may be exempt. Each spouse is told his or her “share”. The “share” of assets for the spouse at home will **not** be counted in figuring the Medicaid eligibility of the long term care spouse, or the spouse on a waiver. **The purpose of the assessment is to allow the spouse at home to keep some of the assets.**

When should this be done?

An assessment should be done at the time a spouse enters a long term care facility, or when a spouse applies for home and community based waiver services. The assessment **must** be based on the assets both spouses own on the day a spouse enters a long term care facility or applies for waiver services. If you have a spouse in a long term care facility or on a waiver, ask for an assessment **now**, even if you don’t need Medicaid yet.

Why have an Assessment?

There are three reasons why you need an assessment:

1. Assessment is the first step to getting Medicaid. If an assessment is not done in the month of entry into the long term care facility or waiver, it may take longer to process your application for Medicaid. This is because your Medicaid worker will have to start by verifying the assets you had the month of entry.
2. If you don’t have an assessment, you may spend assets you could keep. You may assume that you are not eligible for

Medicaid because of assets when some of those assets would not count.

3. Some assets may not count in the assessment such as your home, household furnishings, one car, personal belongings, and some burial plans or life insurance. The assessment will tell you what assets do not count.

How do I get an Assessment?

Here are four easy steps:

1. Talk to a Medicaid worker. Long term care facilities and waivers have a Medicaid worker assigned to them. The staff at the long term care facility or the case manager helping you with the waiver can tell you the name of the Medicaid worker assigned to them.
2. Ask for an assessment.
3. Complete the application for an assessment.
4. Give the application, and proof of your assets, to your Medicaid worker.

Always check with your Medicaid worker before you transfer any assets. A transfer of assets could cause you to be ineligible for Medicaid.

A list of Medicaid worker phone numbers is found on the back of this form.

How much does an Assessment cost?

The Assessment is **FREE!**

CONTACT THE BUREAU OF ELIGIBILITY SERVICES IN YOUR COUNTY FOR MORE INFORMATION

Beaver: 1-800-310-6949 ext. 5082 (Toll Free In Utah) or 1-435-528-5082.

Box Elder: 1-800-310-6949 ext. 3554 (Toll Free In Utah And Idaho) or 1-435-787-3554

Cache: 1-800-310-6949 ext. 3554 (Toll Free In Utah And Idaho) or 1-435-787-3554.

Carbon: 1-800-310-6949 ext. 8010 (Toll Free In Utah) or 1-435-436-8010.

Daggett: 1-800-310-6949 ext. 1416 (Toll Free in Utah) or 435-678-1416.

Davis: 1-800-310-6949 ext. 9624 (Toll Free in Utah) or 1-801-593-9624

Duchesne: 1-800-310-6949 ext. 1416 (Toll Free in Utah) or 435-678-1416.

Emery: 1-1-800-310-6949 ext. 1416 (Toll Free in Utah) or 435-678-1416

Garfield 1-800-310-6949 ext. 8010 (Toll Free In Utah) or 1-435-436-8010.

Grand: 1-800-310-6949 ext. 1416 (Toll Free in Utah) or 435-678-1416

Iron: 1-800-310-6949 ext. 5082 (Toll Free In Utah) or 1-435-528-5082.

Juab: 1-800-310-6949 ext. 8010 (Toll Free In Utah) or 1-435-436-8010.

Kane: : 1-800-310-6949 ext. 5082 (Toll Free In Utah) or 1-435-528-5082

Millard: 1-800-310-6949 ext. 8010 (Toll Free In Utah) or 1-435-436-8010

Morgan: 1-800-310-6949 ext 2204 or 3992 (Toll Free In Utah) or 1-801-825-3992 or 1-801-525-2214.

Piute: 1-800-310-6949 ext. 5082 (Toll Free In Utah) or 1-435-528-5082.

Rich: 1-800-310-6949 ext. 3554 (Toll Free In Utah And Idaho) or 1-435-787-3554.

Salt Lake: 1-800-310-6949 ext.6762 or 1-800-310-6949 ext.6790 (Toll Free in Utah) or 1-801-236-6790 or 1-801-236-6762

San Juan: 1-800-310-6949 ext. 1416 (Toll Free in Utah) or 435-678-1416.

Sanpete: 1-800-310-6949 ext. 8010 (Toll Free In Utah) or 1-435-436-8010

Sevier: 1-800-310-6949 ext. 5082 (Toll Free In Utah) or 1-435-528-5082.

Summit: 1-800-310-6949 ext.1144 or 801-371-1144.

Tooele: 1-801-236-6767 or 1-800-310-6949 ext. 6767 (Toll Free in Utah) .

Uintah: 1-800-310-6949 ext. 1416 (Toll Free in Utah) or 435-678-1416.

Utah: 1-800-310-6949 ext.1144 or 801-371-1144.

Wasatch: 1-800-310-6949 ext.1144 or 801-371-1144.

Washington: 1-435-688-0489 ext.501.

Wayne: 1-800-310-6949 ext. 8010 (Toll Free In Utah) or 1-435-436-8010.

Weber: 1-800-310-6949 ext. 2214 (Toll Free in Utah) or 1-801-310-6949 ext. 0891 or 1-801-525-2214 or 1-1801-779-0891